MT VOTES
Reports & Labels

Reports vs. Extracts
Election Reports
Voter Reports
Districts & Precincts
Petitions
Ballot Processing
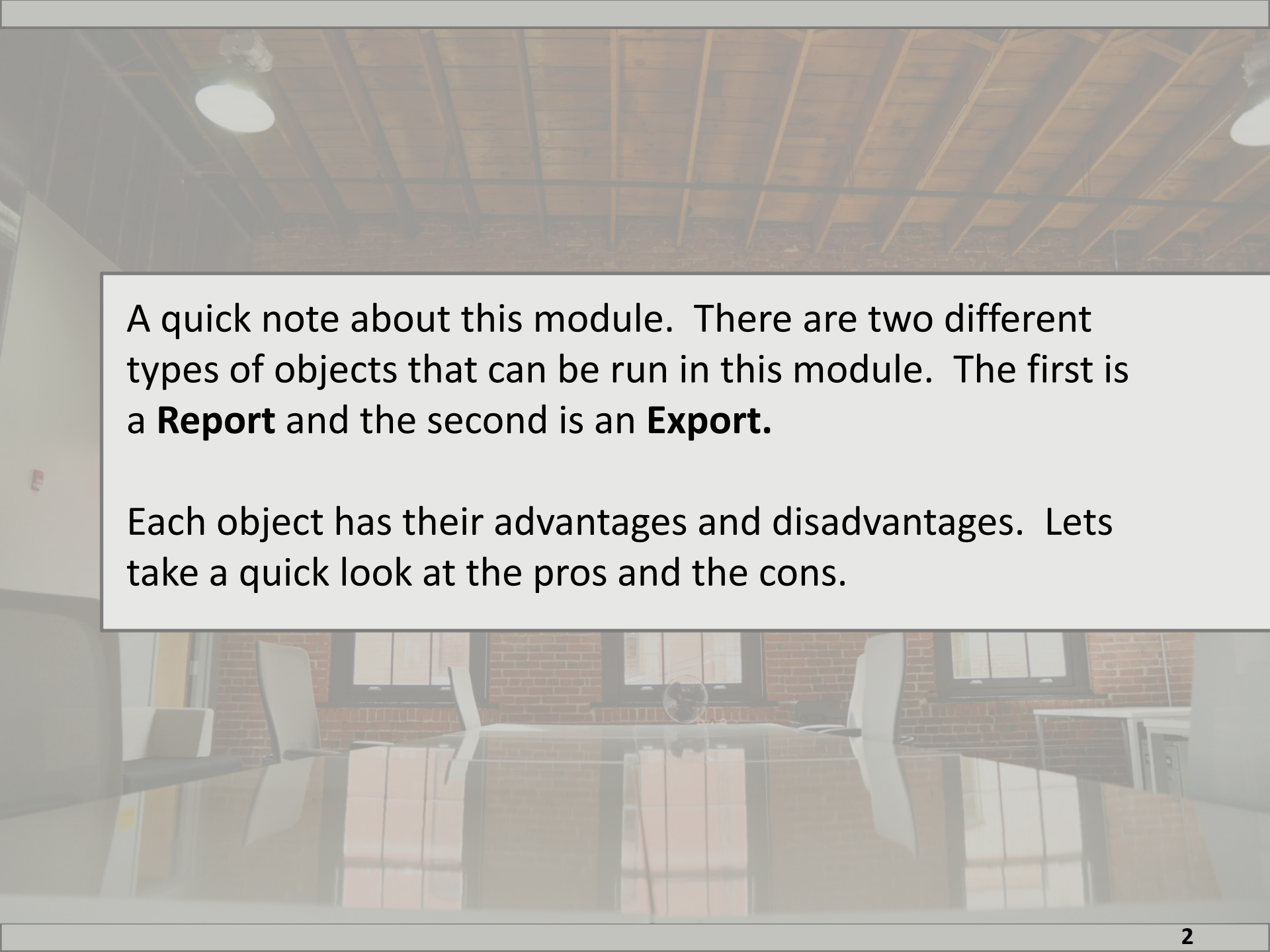
2016 Montana Election Administrator Certification Training

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Elections and Government Services
Sos.mt.gov   soselections@mt.gov

A quick note about this module. There are two different types of objects that can be run in this module. The first is a **Report** and the second is an **Export.**

Each object has their advantages and disadvantages. Lets take a quick look at the pros and the cons.

Reports

Pros:

- Quick
- Easy to run
- Set up for printing

Cons:

- Harder to query
- Potentially very large files

Exports

Pros:

- Excel compatible
- Easy to format
- Same data as the corresponding report

Cons:

- Harder to run than reports
- General Excel knowledge is required to work with the data

Lets look at how to run an export first.

Running Exports

As mentioned earlier, Exports are fairly powerful, but they take a little more effort to work with. So I'll walk you through running an export, and then Alan will talk briefly about working with the data.

We will run the EX-E01. This export contains all absentee (or mail ballot information) for the election. It contains a lot of extremely useful data.

Exports are more powerful than reports because you can ask questions of the data after you pull the data out of the system. So, we will run the EX-E01 export 'wide open' which means that we will get the maximum amount of data out of MT Votes that we can. So the parameters that we will want are: All Precincts, All Ballot Styles, All Absentee Types, and All Ballot styles for the selected election.

Reports

File(s) exported successfully. Exported file is available under export tab in Schedule Jobs Module.

Voter Search   Help

Voter Registration
Election Managemen
Districts & Precincts
Petitions
Election Workers
Address Library
Labels
Ballot Processing
Master Lookups
Close

County
Lewis & Clark

Election
Test Federal Primary Poll Election - 01/19/2016

Precincts | District

Precincts
☑ All (Deleted precincts will be included on report)
☐ PCT 01 - P01
☐ PCT 02 - P02
☐ PCT 03 - P03
☐ PCT 04 - P04

Ballot Style
☐ All Ballot Styles

Description
☐ PCT 01
☐ PCT 02
☐ PCT 03
☐ PCT 04
☐ PCT 05

☐ Range
From PCT 01 - P01
To   PCT 01 - P01

Budget Group
All

Date Range
Sent | Receive
From   To

Absentee Type
☑ All Absentee Types
☐ Absentee List
☐ Civilian Overseas
☐ Election Specific

NVRA Notice Type
○ 1st Notice
○ 2nd Notice
○ Cancellation of voters

Ballot Stages
☑ All   ☐ Exclude 'Sent/Void' ballots

Description
☐ Certified
☐ Not Requested

Code	Name
EX-E01	Export for Absentee Voters in an Election
EX-E015	Export for Absentee Type Date Range
EX-E016	Candidate List
E-001	Absentee Voters for an Election
E-005	Election Districts Included In Election

Sort Order
Ballot Style

Export   Cancel   Run Report

MT VOTES
About

User: sjolund, casey   County: Lewis Clark   Date: 12/16/2015   Password Help Exit

Environment Test Environment MT VOTES

Voters
Voter Registration
Voter Search
Voter Merge
Batch Scan
Commit Batch
Elections
Election Management
Election Calendar
Ballot Processing
Provisional Ballots
Petitions
Petitions
Pre-Registration
Online Pre-Registration

Administration
System Configuration
User Administration
Address Library
Legal Address Library
Messaging
Document Templates
Load External Data
NVRA Process
Reports
Reports & Labels
Schedule Jobs
Batch Management
Agency Search
Potential Felons
Last Updated 12/05/2015
Potential Deceased
Last Updated 11/14/2015

12/4/2015   Message Sent to other County ... oval: Lewis & Clark County is trying to merge Voter...

Schedule Manager

Voter Search Help

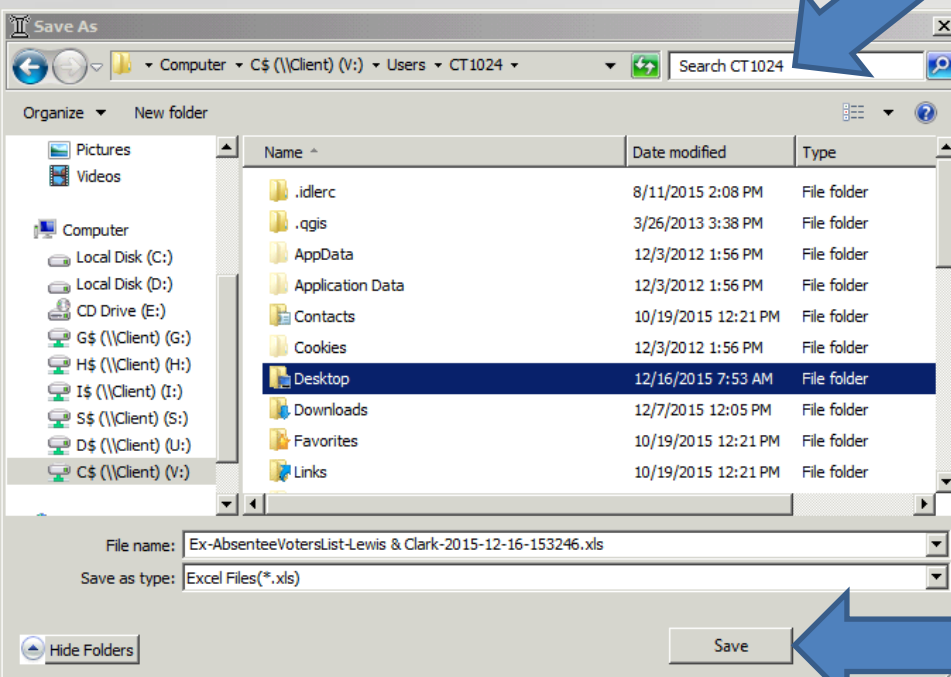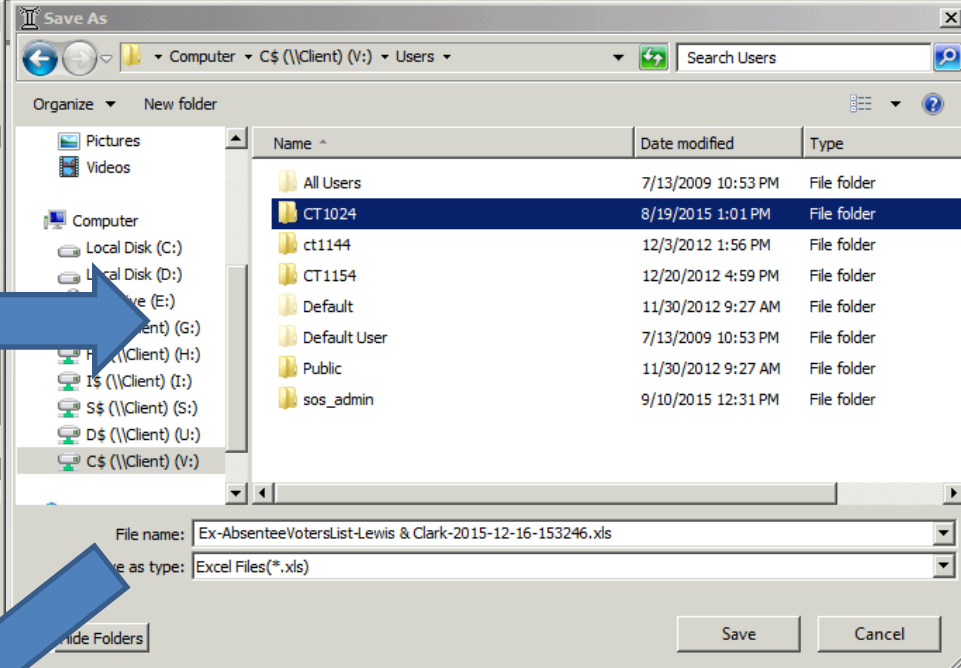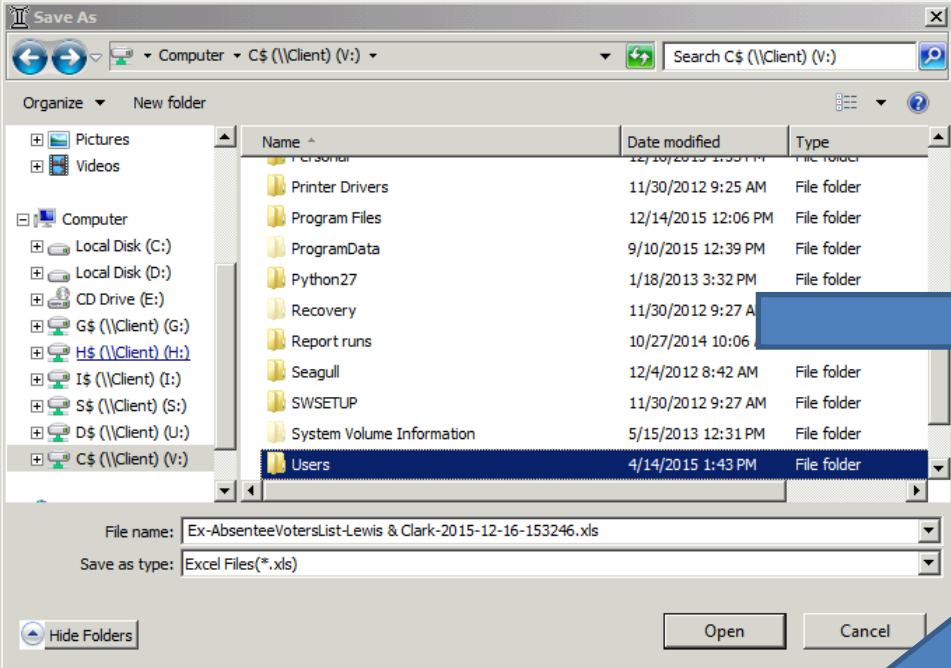Date   Time 12 0   escription   Reschedule
                                                        Delete

Job List | Report Ouput | Export

File Name	Created On
Ex-AbsenteeVotersList-Lewis & Clark-2015-12-16-153246.txt	12/16/2015 3:32:46 PM
EX-AL01-Address Rule Export-Lewis & Clark-2015-12-07-143045.xls	12/7/2015 2:30:45 PM

Delete   Move

Confirmation

Are you sure want to move this file ?

Yes   No

To save the file onto your computer:

1) Find the C$ (\\Client)(V:)
2) In the window, double click on the Users folder
3) In the Users folder click on the folder named after how you log into your machine
4) Double click on Desktop (this should be your desktop)
5) Save the file here, or in the folder on your desktop.

The USERS folder contains every account that exists on your workstation.

You don't have to use the desktop folder, but this will put the file right onto your desktop. This makes it easy to find.

C$(\\Client)(V:) V:\USERS\YOURNAME\Desktop

This is by far one of the most important parts of exporting or saving a file out of MT Votes. If you save it anywhere else, you'll never find it.

This folder will vary for every user here. Look for the folder with the name you use to log into your workstation with.

The EX-E01 contains the following fields:
- Voter ID
- Tracking No
- Dist/Precinct Name
- BallotID
- RegistrantName
- DOB
- Residential Address
- Ballot Sent
- Ballot Received
- Precinct Code
- Split
- Ballot Style
- Voter Status
- Voter Status Reason
- Ballot Stage/Status
- Ballot Status Reason
- Ballot Number
- Ballot Type
- Ballot Issue Reason
- Issue Method
- Election

- Sent to Address
- Send to City
- Send to State
- Send to Zip
- Sent to Plus 4
- Send to Country
- Resent Date
- Resent Address
- Resent City
- Resent State
- Resent Zip
- Resent plus 4
- Resent Country
- Absentee Type

It's not important that you know every single field on these exports, but seeing this extensive list should give you a pretty good idea of what sort of questions you can ask from this data.

Some example answers you could find out from this export:
- All ballots in Prepared (Useful if you can't close your election!)
- All ballots received on a certain day
- All ballots received on a certain day that were issued In-Person
- All ballots received on a certain day that were issued In-Person that were in split 17.2
- All Late Registrants that had an issue method of Mail (Hopefully 0!)
- Average time it takes individuals in precinct 2 to return their ballot
- How many absentee ballots were reissued or resent
- How many UOCAVA ballots returned by Election day

These are countless other questions you can ask of the data, and the great thing about this export as opposed to reports is that you can ask all these questions from one file. Once you have the export sitting on your computer you can look at the data any way you'd like. It's also a great snapshot of the time you ran this export.

Handling Exports

Example:
EX-E01 Absentee Export

This part of the presentation will walk you through the steps of:

- Removing and Filtering Data
- Printing an Export

Opening the EX-E01 Absentee Export

1st: Open the folder it is saved in

\SOSCLUSTER_VOL1_SERVER\VOL1) (S:) ▾ ELB ▾ Statistical-and-DataTracking ▾ Absentee

urn   New folder

Name ▲	Date modified	Type	Size
Absentee-Application-Sources-All-Types	1/4/2016 5:11 PM	File folder	
Absentee-Sources-No-Type-No-Status-01-04-2016.xlsx	1/4/2016 8:49 AM	Microsoft Excel Wor...	11 KB
All-Statutes-All-Outputs-Absentee-List-Type-01-03-2016-263391.csv	1/3/2016 4:51 PM	Microsoft Excel Com...	96,910 KB
All-Statutes-All-Outputs-Absentee-List-Type-Absentee-List-Status-01-04-2016-258017.csv	1/4/2016 4:30 PM	Microsoft Excel Com...	5,005 KB
Test-EX-E01-2014-General-01-15-2016.xls	6 8:33 AM		

2nd: Click on the file name

3rd: Right click and click Open

Open
New
Print

14

Opening the EX-E01 Absentee Export

Microsoft Excel

⚠️ The file you are trying to open, 'Test-EX-E01-2014-General-01-15-2016.xls', is in a different format than specified by the file extension. Verify that the file is not corrupted and is from a trusted source before opening the file. Do you want to open the file now?

| Yes | No | Help |

Click Yes

Opening the EX-E01 Absentee Export

Opening the EX-E01 Absentee Export

Text Import Wizard - Step 2 of 3

This screen lets you set the delimiters your data contains. You can see how your text is affected in the preview below.

Delimiters

☑ Tab
☐ Semicolon
☐ Comma
☐ Space
☐ Other:

☐ Treat consecutive delimiters as one

Text qualifier: "

The "Tab" box should already be checked by default; if not, click the box

Data preview

County	VoterID	Tracking No	District/Precinct Name	BallotID	Re...rant...
Beaverhead	3			452779714	L, JAS...
Beaverhead	4			452921364	ALEXA...
Beaverhead	4			452894889	DSON, R...

Cancel   < Back   Next >   Finish

Click Next

Opening the EX-E01 Absentee Export

Raw EX-E01 Absentee Export
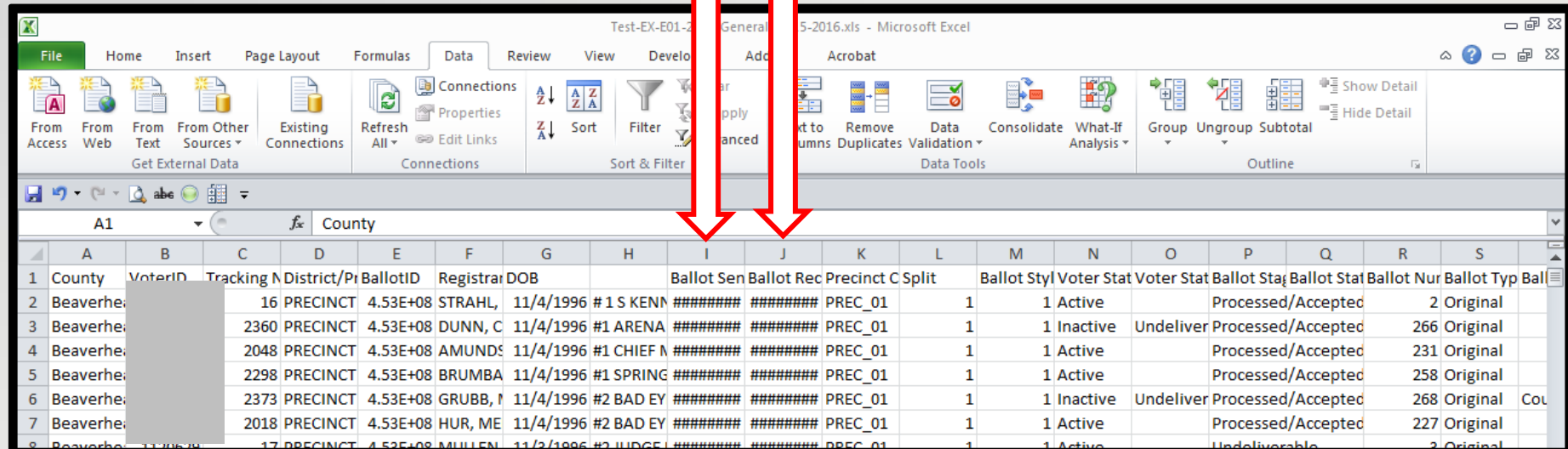## (all data have been randomized and do not represent actual voters)

Notice there is a blank Row 2; select this and delete it as directed below.

1st: Left click on the "2" to select Row 2
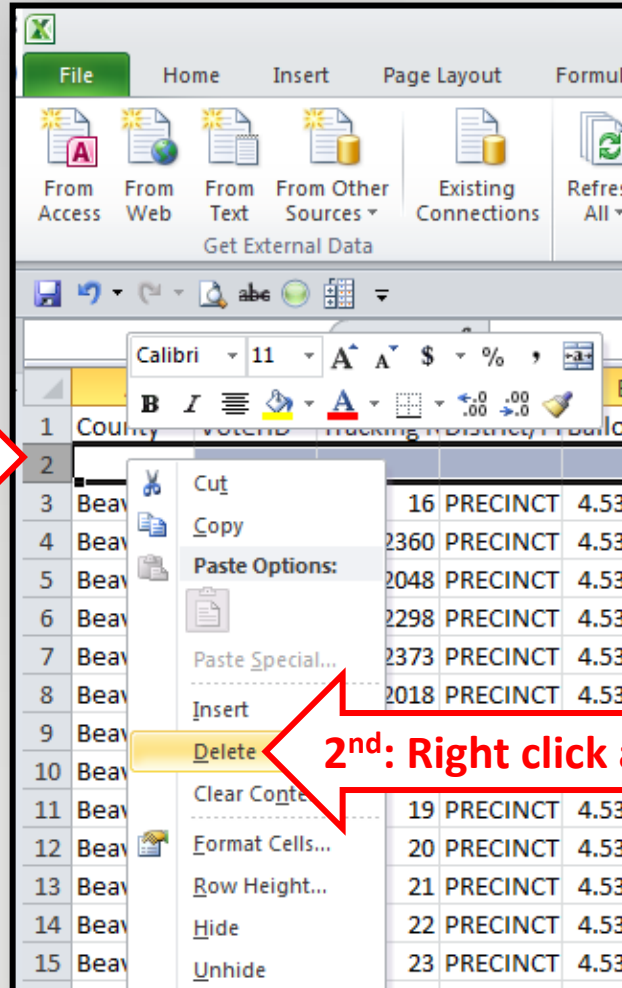
2nd: Right click and choose Delete

This is how EX-E01 will look after deleting the blank row 2. You will notice that some of the columns are not wide enough to fit the contents

Widening Columns

To widen a column so that you can see all of its contents, position the mouse over the **line between the columns** so that the cursor becomes a **double black arrow,** then left click, hold, and drag the arrow to the right

For example, in the first screen shot below, the DOB column data is not completely visible, while in the second screen shot the column has been widened by **clicking and dragging the double arrow to the right**
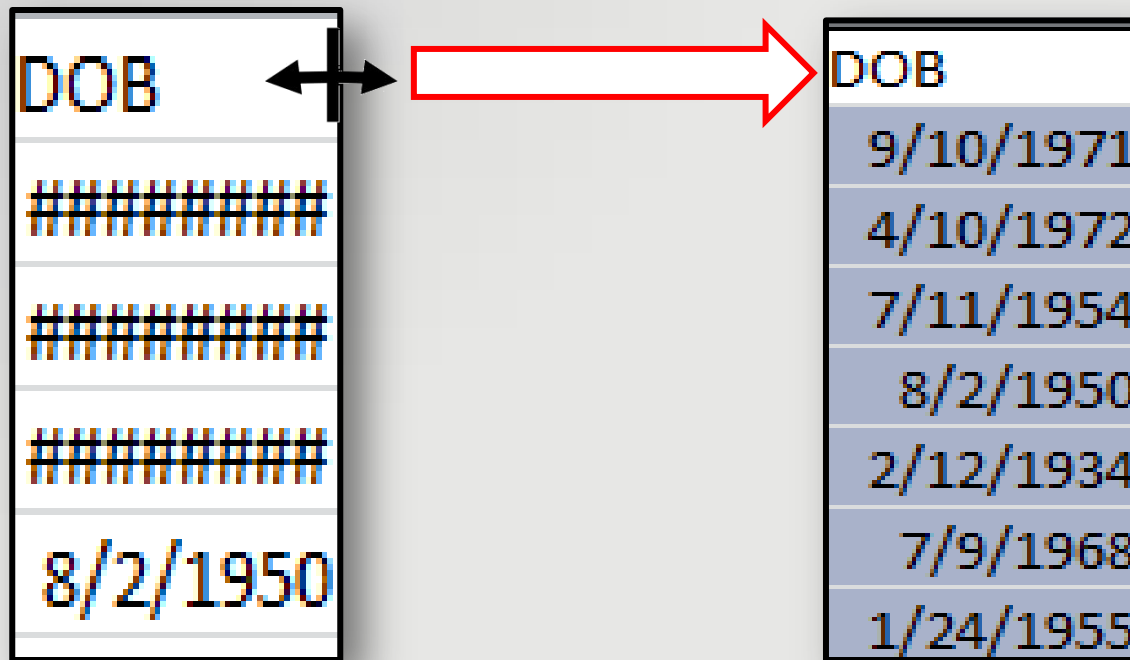
To choose all columns, click the icon in the corner between the first row number and first column letter


Click here to select all columns
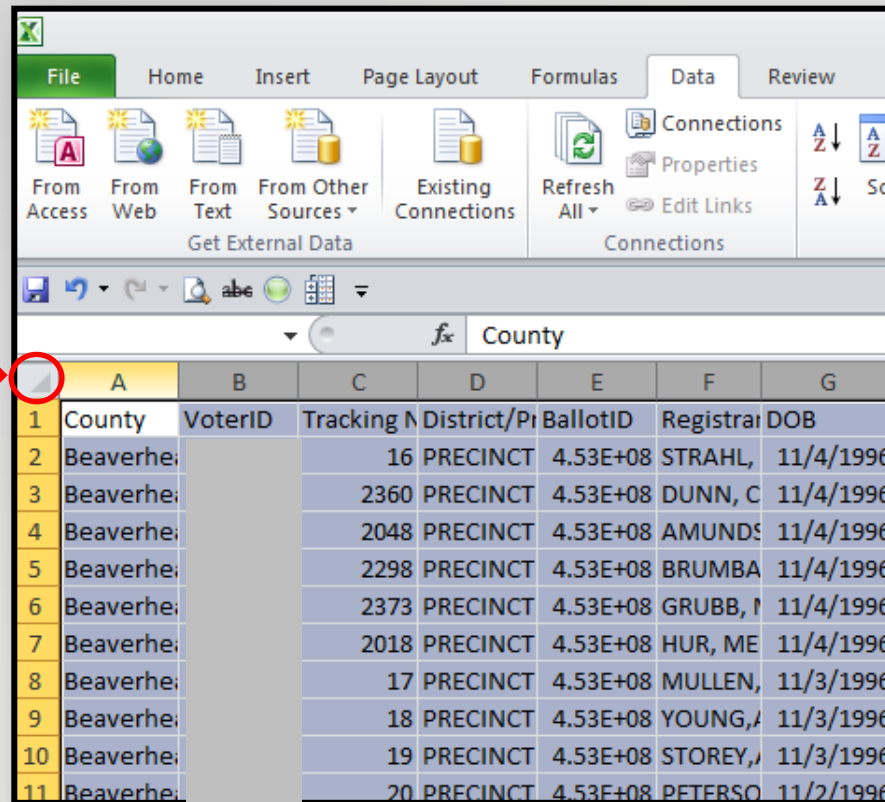
Hover your mouse between **any two columns** until you see the **double arrow**, then double-click the left mouse button. You will see that all of the columns have been **widened** to fit the data.

Putting the cursor between two columns and double clicking widened all the columns at once
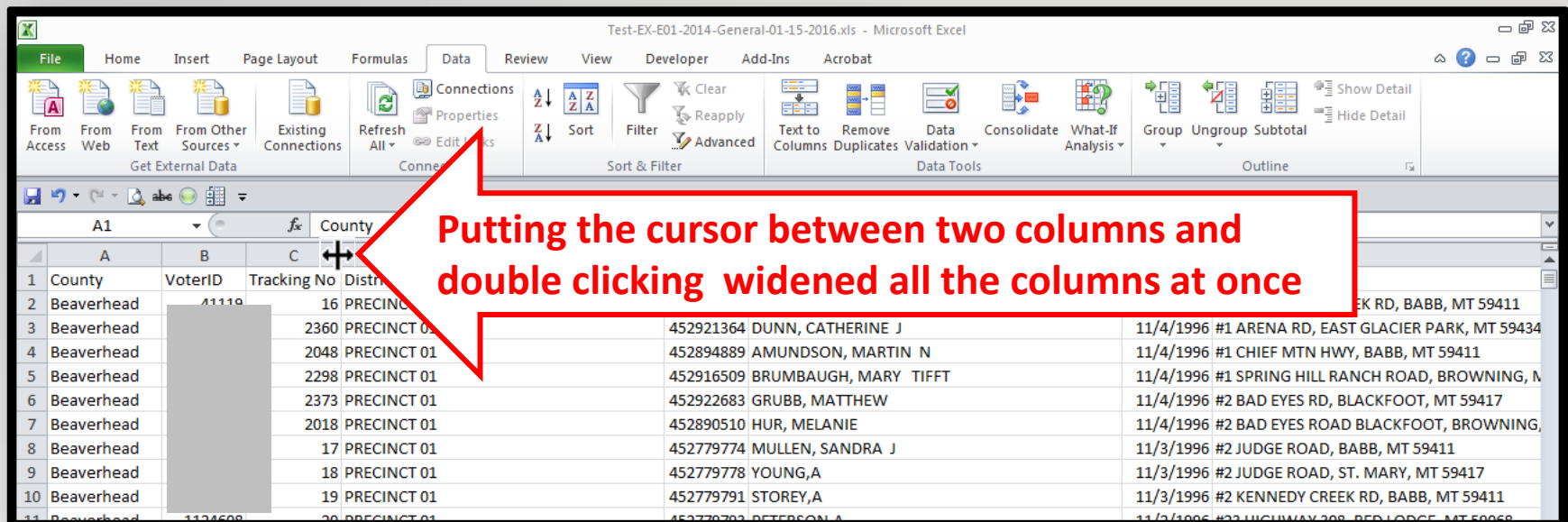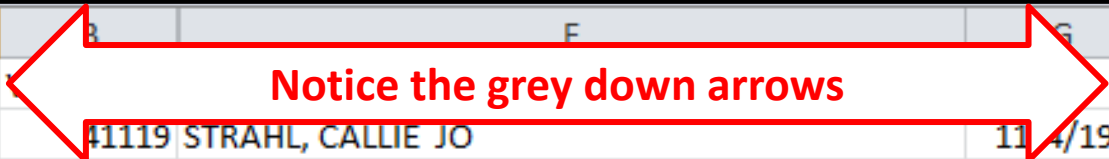
Filtering the Export
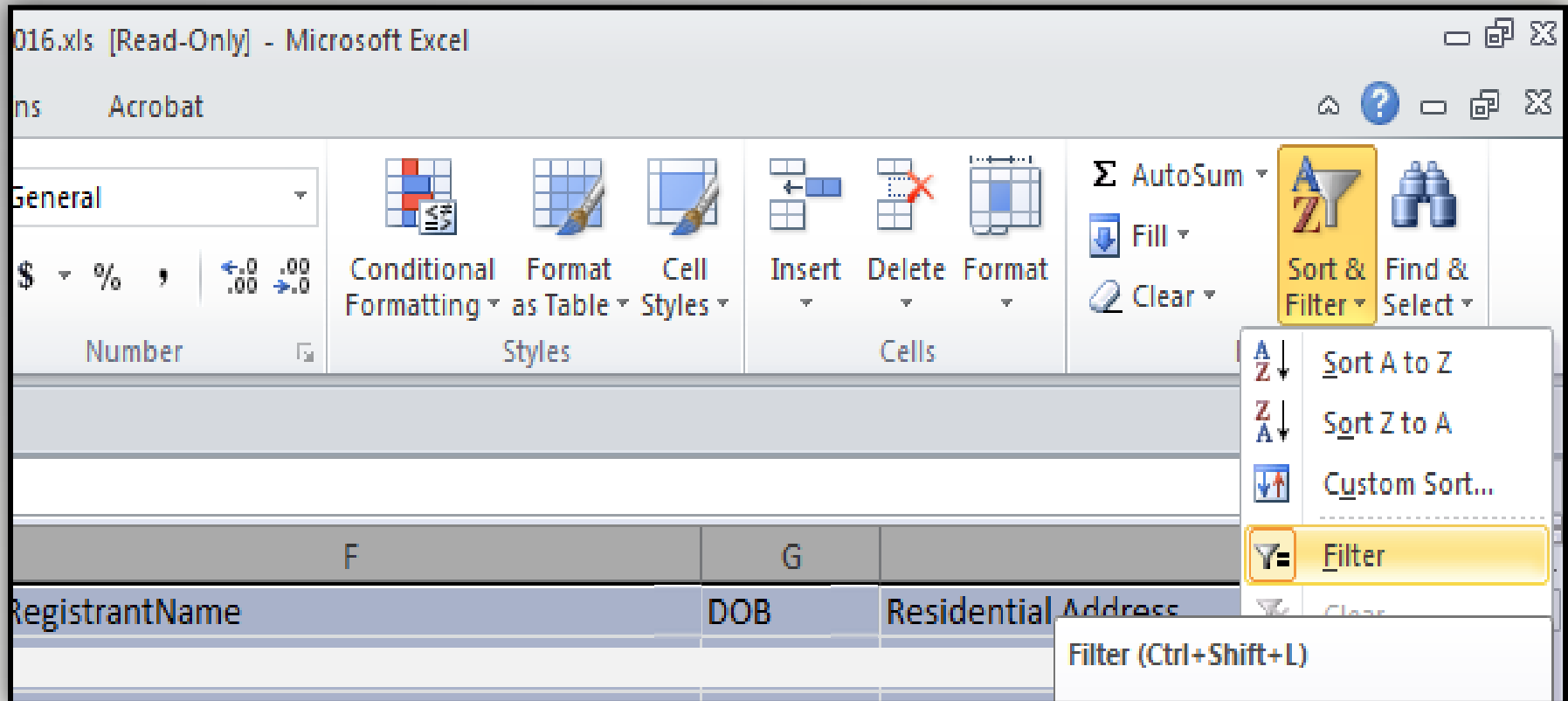
Filtering allows you to view only the data that you want to view. To filter the list, on the Home tab choose the selections below (or place your cursor in the first cell and hit CTRL-SHIFT-L).
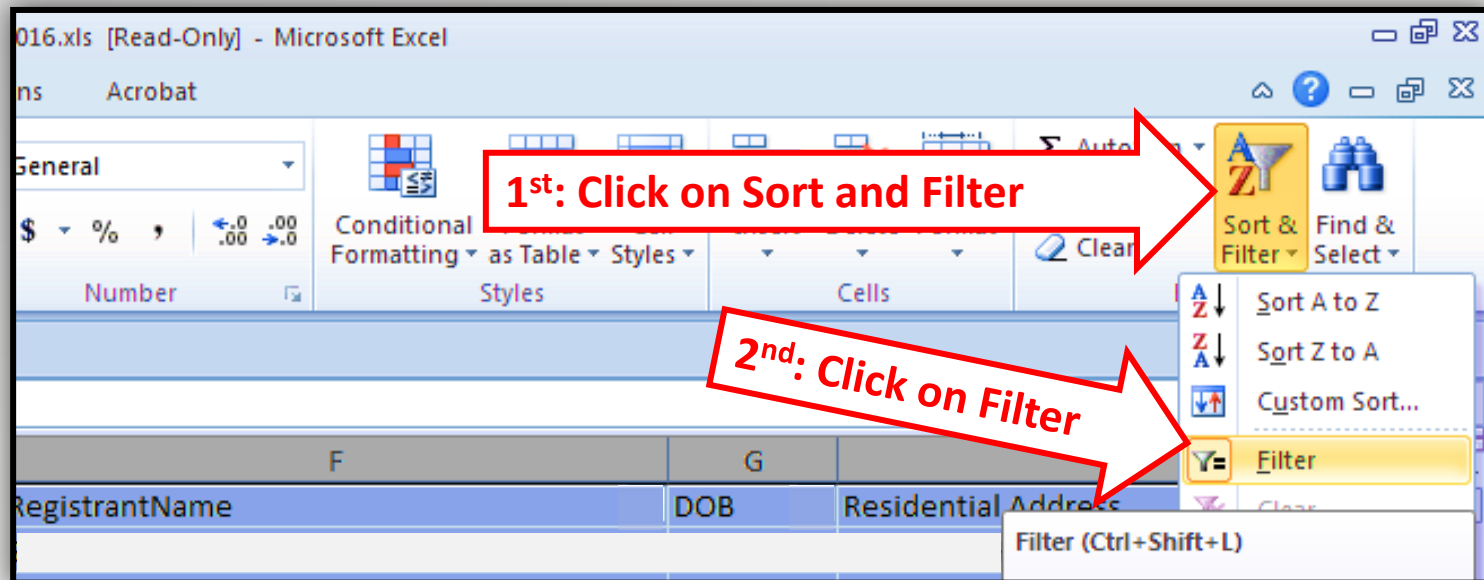
You will see that each column now has a gray box with a down arrow in the box

	A	B	F	G
1	County ▾		**Notice the grey down arrows**	▾
2	Beaverhead	41119	STRAHL, CALLIE JO	11/4/1996
3	Beaverhead		DUNN, CATHERINE J	11/4/1996
4	Beaverhead		AMUNDSON, MARTIN N	11/4/1996
5	Beaverhead		BRUMBAUGH, MARY TIFFT	11/4/1996
6	Beaverhead		GRUBB, MATTHEW	11/4/1996
7	Beaverhead		HUR, MELANIE	11/4/1996
8	Beaverhead		MULLEN, SANDRA J	11/3/1996
9	Beaverhead		YOUNG,A	11/3/1996
10	Beaverhead		STOREY,A	11/3/1996
11	Beaverhead		PETERSON,A	11/2/1996
12	Beaverhead		BUENROSTRO,A	11/2/1996
13	Beaverhead		WORRELL,A A	11/2/1996
14	Beaverhead		SINGER,A A D III	11/2/1996
15	Beaverhead		HATFIELD,A ALLAN	11/2/1996

Let's say that you **only** want to see Undeliverable ballots. Scroll over to the **Ballot Stage/Status** column, then do the steps below.

1st: Click on the Filter arrow for the Ballot Stage/Status column

2nd: Uncheck the boxes so that only the Undeliverable box is checked

3rd: Click OK

Before you begin applying filters, to easily see the **Voter IDs**, you can **"freeze"** the applicable columns. The steps below will freeze the **columns to the left of, and the row above,** the selected cell.
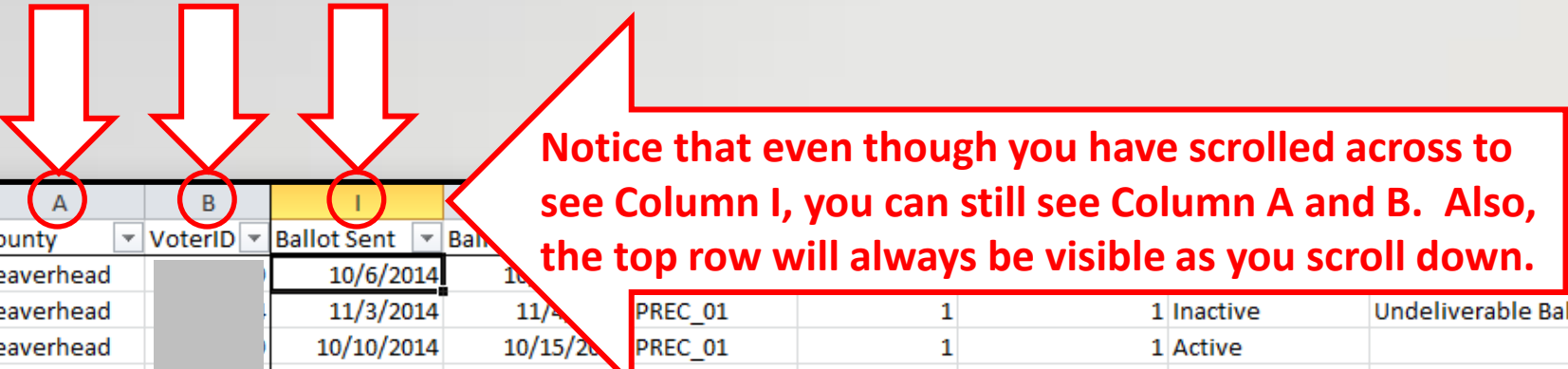
Now when you scroll over, **it will keep Column A and B as the first columns**, even though they would otherwise not be visible as you scroll across, and it will **keep Row 1 as the first row when you scroll down**.

Notice that even though you have scrolled across to see Column I, you can still see Column A and B. Also, the top row will always be visible as you scroll down.

	A	B	I	Bal					on	
1	County	VoterID	Ballot Sent							
2	Beaverhead		10/6/2014	10							
3	Beaverhead		11/3/2014	11/4	PREC_01		1	1	Inactive	Undeliverable Ballot
4	Beaverhead		10/10/2014	10/15/2	PREC_01		1	1	Active	
5	Beaverhead		10/30/2014	10/31/2014	PREC_01		1	1	Active	

Changing the Filters
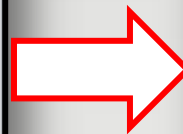
Let's choose only people issued a ballot **the day before election day**. First, remove the **Undeliverable** filter from Ballot Stage/Status
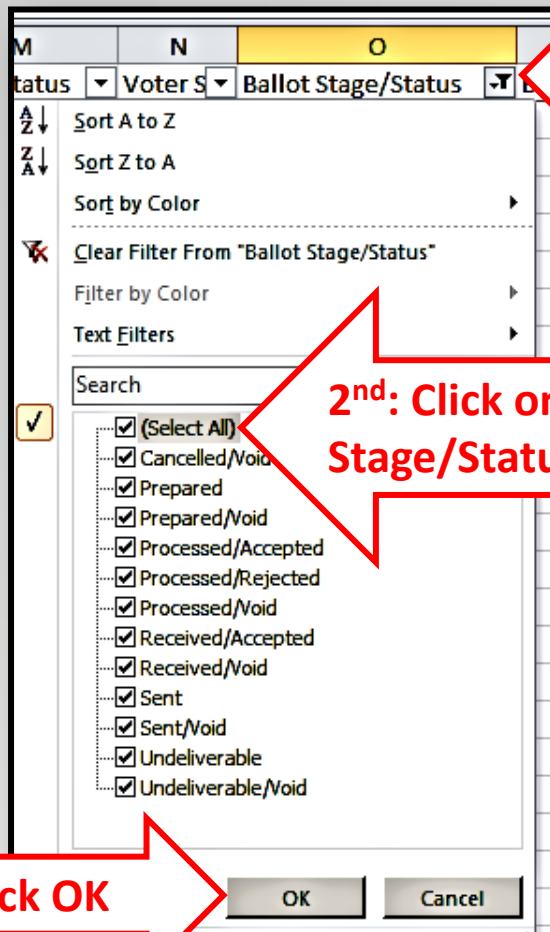
1st: Click on the Ballot Stage/Status arrow to change the filter options

2nd: Click on "Select All" so that you can see all Ballot Stage/Statuses rather than just Undeliverable

3rd: Click OK

Now click on the **Ballot Sent** column filter arrow, click the **Select All** box to remove all checks, then check only the box for **November 3**.

1st: Click on the Ballot Sent arrow

2nd: Unclick the Select All Box

3rd: Only check the November 03 box

4th: Click OK

Now you can see only people who were issued a ballot November 3, the day **before election day**.

|	A	B	I			
1	County	VoterID	Ballot Sent			
3	Beaverhead		11/3/2014	11/4/2014	PREC_01	
106	Beaverhead		11/3/2014	11/3/2014	PREC_01	
			11/3/2014	11/3/2014	PREC_01	
165	Beaverhead		11/3/2014	11/3/2014	PREC_01	
210	Beaverhead		11/3/2014	11/3/2014	PREC_01	
273	Beaverhead		11/3/2014	11/4/2014	PREC_01	

This icon shows that a filter has been applied to the column

Only ballots issued the day before election day will be showing

If at any time you want to **remove the filter** in order to see all of the ballots, select the Home Tab and repeat the steps below that you used in order to create the filter.
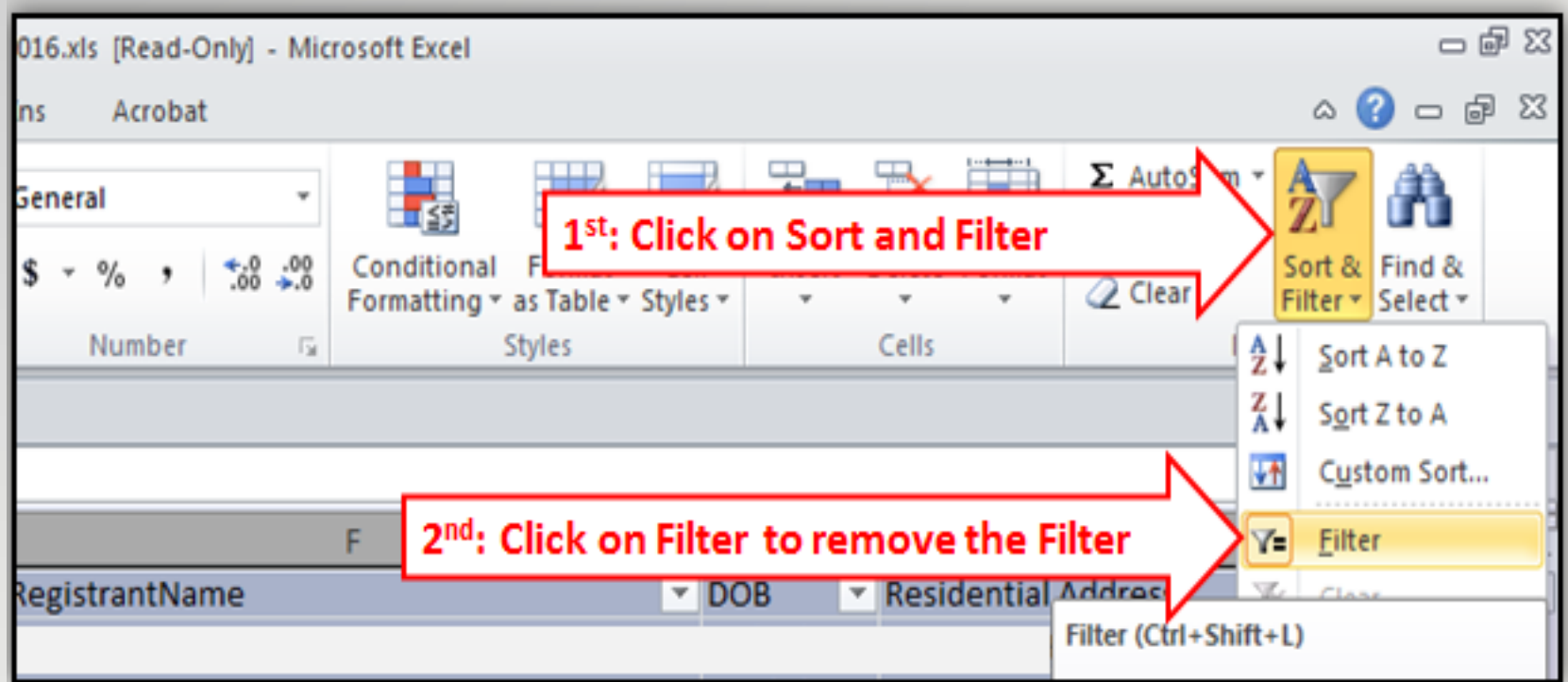
Printing the Export
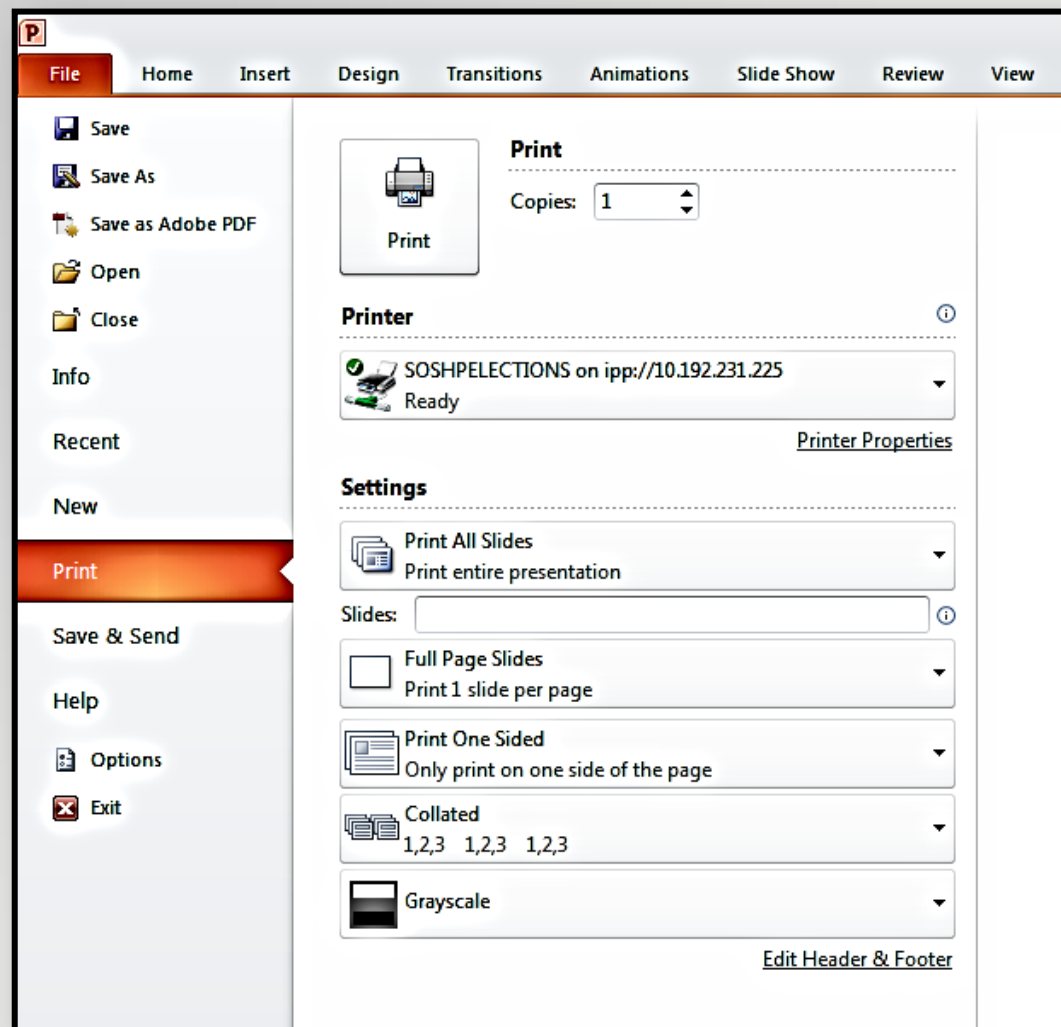
If you want to print only the information for people who were sent ballots before election day, you can hide any columns you don't want to print.

Select the Columns to hide by left clicking a column letter, holding the left mouse button, and scrolling over the Column letters such as "C," "D," and "E."

Right click and choose Hide.

Warning! These instructions are for formatting an Export for **printing**. If you are formatting an Export for emailing or otherwise providing electronically, and you do not wish to include certain columns, select and **delete** them rather than hiding them
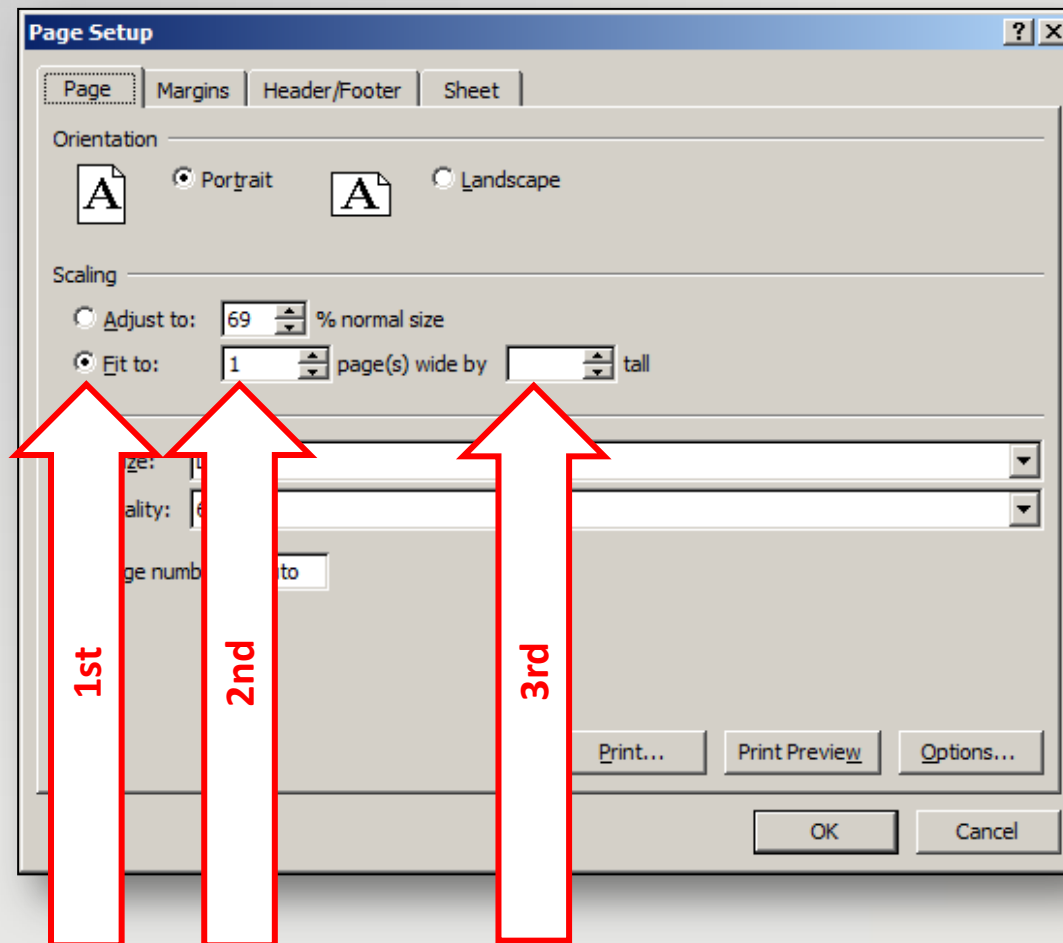

Right click and choose Delete if you do not want to include certain columns when sending an Export.

Next, in order to make your columns fit on one page, in the **Page Layout** menu, click on the small arrow in the bottom right hand corner.
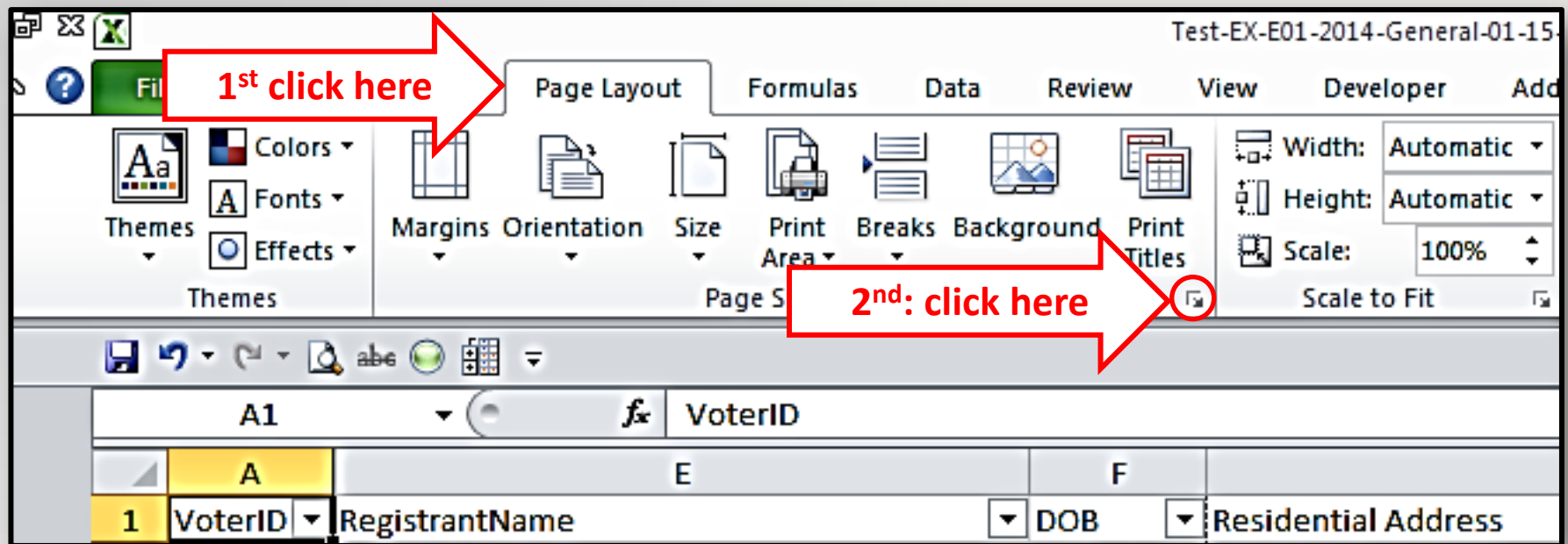
In the Page Setup menu that appears, choose to fit your data to 1 page wide by [blank] pages tall.
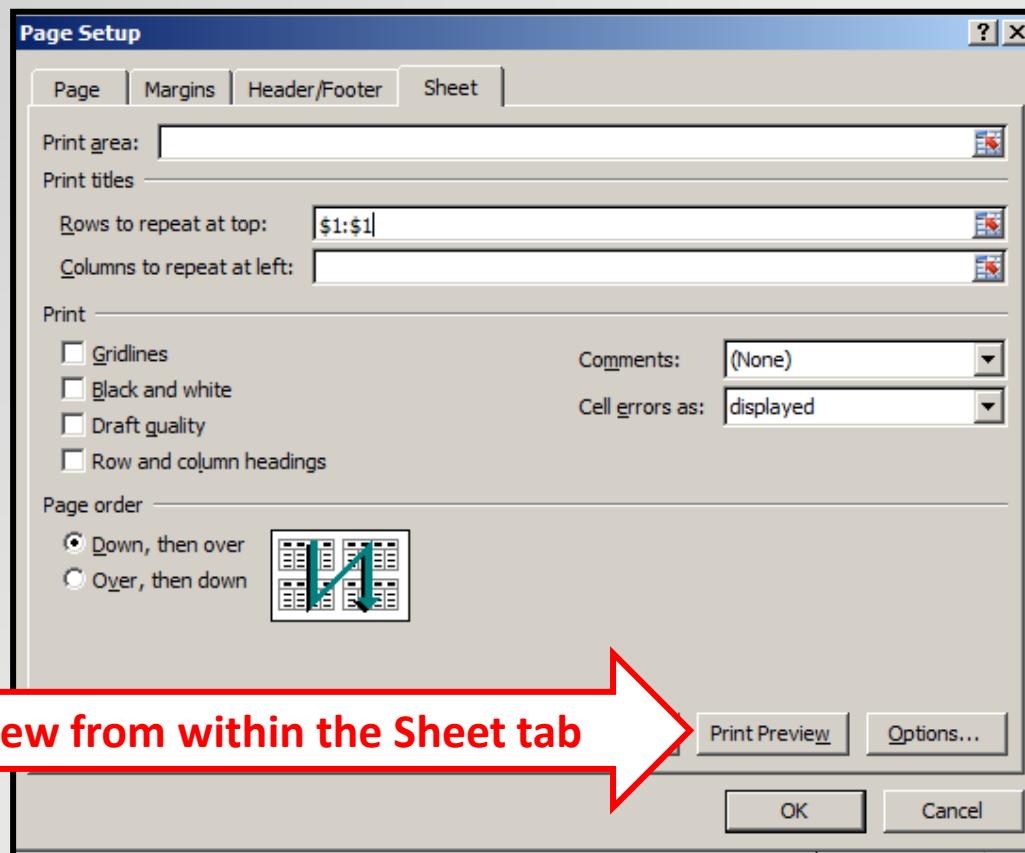
To repeat the **header rows** at the top on each page of your printout, click on the Sheet tab, click in the "Rows to repeat at top:" area, and choose the first row.
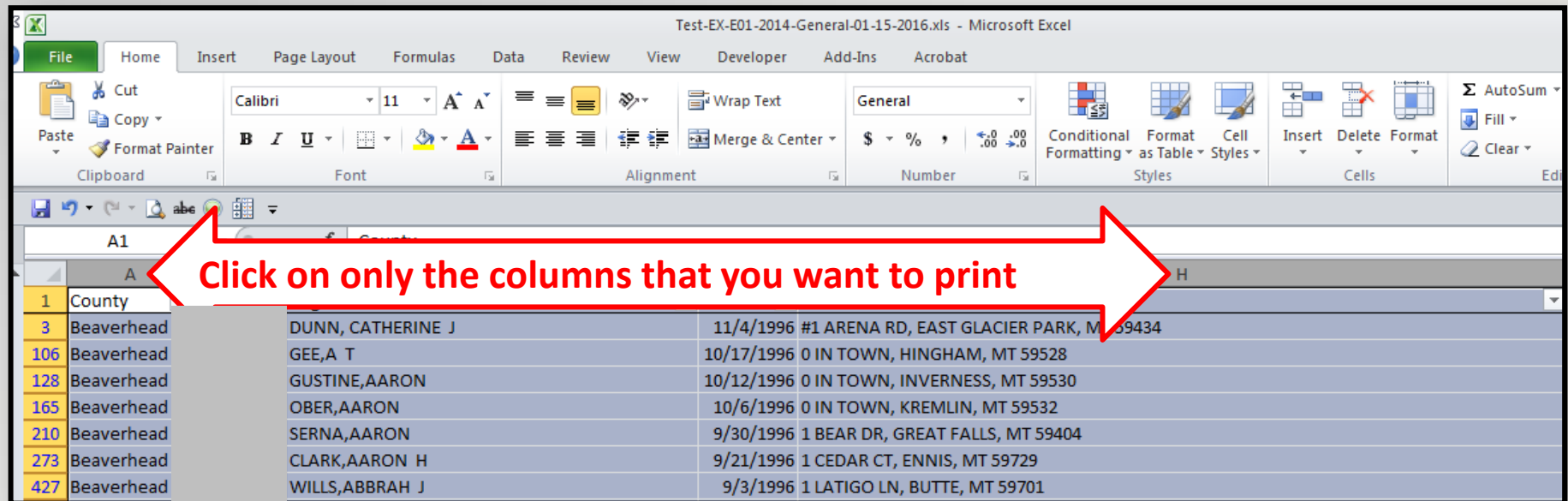
2nd: Click on Row 1

1st: Click on Sheet tab

3rd: After clicking on Row 1, this information will autofill, or you can enter it manually

Next, within the Sheet tab, click on **Print Preview**.

Choose Print Preview from within the Sheet tab

You will notice that there are too many columns in the Export to print. To help with this, go to your document and select only the columns that you want to print.

Click on only the columns that you want to print

Go to **File**, **Print**. Under Settings, choose **Print Selection** to only print the columns that you selected.

1st: Click on File

2nd: Click on Print

3rd: Click on Print Selection to only print the selected columns

You will notice that the font sizes are quite small. To help with this, under Portrait Orientation, choose **Landscape** instead.

Choosing **Landscape Orientation** may make the columns fit better going across.

Now you can **Print** the Export; remember that if you instead choose to send it **electronically**, first delete any columns that you do not wish to include
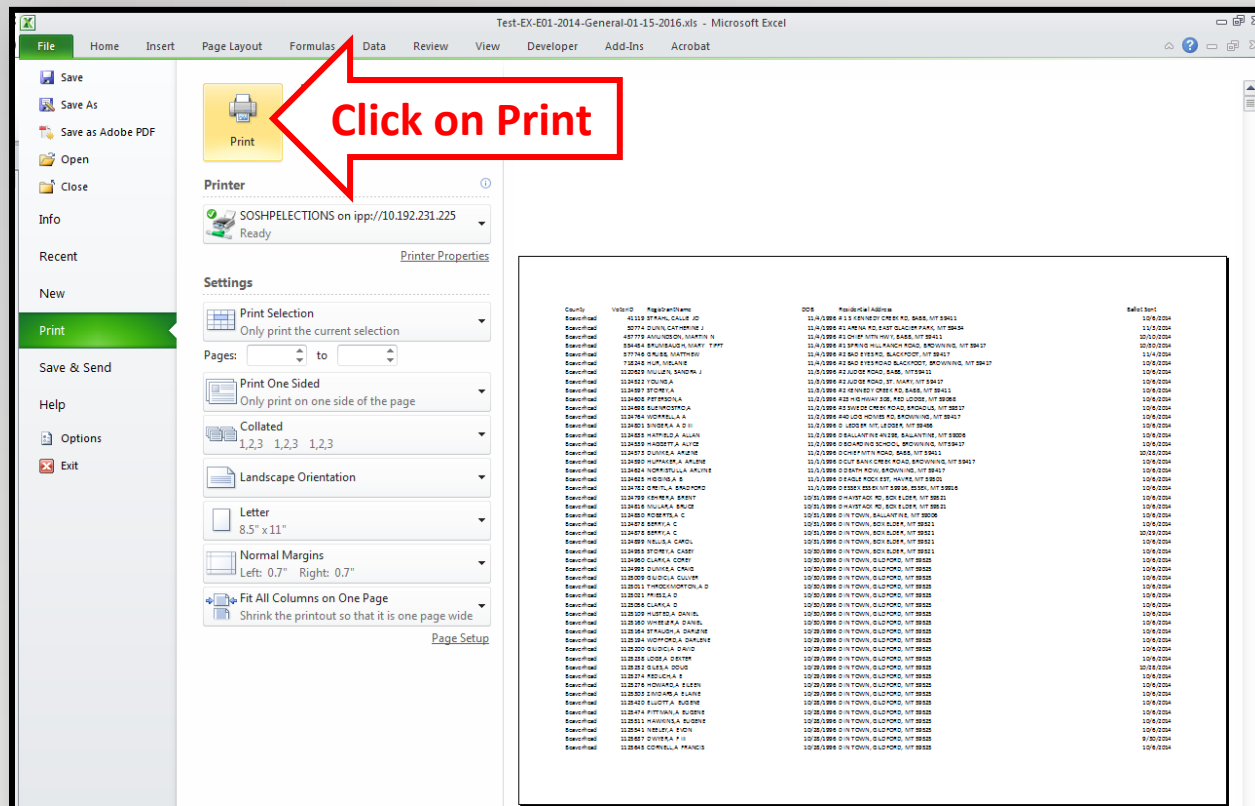
Running Reports

MT Votes makes running reports pretty easy. You simply select the report (1), feed the report the parameters (2) and select **Run Report.**

Not all parameters are required! If you attempt to run the report and it does not contain a required parameter, MT Votes will notify you with a red flashing exclamation blob.

Likewise, if you include too many conflicting parameters, MT Votes will not be able to process your request and it will give you red flashing exclamation blob that you can mouse over for more information.

In this example, MT Votes can only take the parameter of **All Precincts** OR **All Districts**, not both.

Here is the general appearance of a report. This is the E-001, which is the report version of the EX-E01 Export shown earlier.

You can ask most of the same questions about the Report that we could have in the Export, but you must re-run the report every time inputting different parameters. Depending on the report, this can take large amounts of time.

Report/Export Types

Election Reports

- **EX-E01 -** Export Absentee Voters in an Election
- **EX-E015 -** Export for Absentee Type Date Range
- **EX-E016 -** Candidate List
- **E-001 -** Absentee Voters for an Election
- **E-005 -** Election Districts Included in Election
- **E-006 -** Election Expenses Apportionment
- **E-007 -** Election Billing Worksheet
- **E-008 -** Allocation Cost Worksheet
- **E-011 -** Absentee Batch Report
- **E-014 -** NVRA Report
- **E-015 -** Absentee Type Date Range Report
- **E-016 -** Candidate List Report

Election Reports (least useful stricken)

- **EX-E01 -** Export Absentee Voters in an Election
- **EX-E015 -** Export for Absentee Type Date Range (Used for biennial absentee confirmations)
- **EX-E016 -** Candidate List (Export of candidates in an election)
- **E-001 -** Absentee Voters for an Election(Information about every absentee ballot)
- **E-005 -** Election Districts Included in Election(Shows all districts in the election)
- ~~**E-006 -** Election Expenses Apportionment~~
- ~~**E-007 -** Election Billing Worksheet~~
- ~~**E-008 -** Allocation Cost Worksheet~~
- **E-011 -** Absentee Batch Report (Most useful if you run by individual batch)
- ~~**E-014 -** NVRA Report~~
- **E-015 -** Absentee Type Date Range Report (Used for biennial absentee address confirmations)
- **E-016 -** Candidate List Report (A report of candidates in an election)

Election Reports – Most Useful

- **EX-E01 -** Export Absentee Voters in an Election
- **EX-E015 -** Export for Absentee Type Date Range (Used for biennial absentee confirmations)
- **EX-E016 -** Candidate List (Export of candidates in an election)
- **E-001 -** Absentee Voters for an Election (Information about every absentee ballot)
- **E-005 -** Election Districts Included in Election (Shows all districts in the election)
- **E-011 -** Absentee Batch Report (Most useful if you run by individual batch)
- **E-015 -** Absentee Type Date Range Report (Used for biennial absentee address confirmations)
- **E-016 -** Candidate List Report (A report of candidates in an election)

Voter Registration

- **EX-001 –** Voter Walking List
- **EX-002** – Voting History List
- **EX-003 –** Registered Voter List
- **EX-004** – Statewide Voter Extract
- **EX-005 –** Statewide Voter Purge
- **EX-006 –** Statewide New Registrants
- **EX-007** – Statewide Absentee Requestor
- **EX-008 –** Statewide Late Registration
- **EX-009 –** Statewide Changes to Registrants
- **EX-010 –** Statewide Jury Pool Extract
- **EX-011 –** Late Registration Statistics
- **EX-012 –** Voter Polling Place List
- **EX-013** – Federal Survey Duplicate Registration Export

- **VR-001** – Change of Counties Report
- **VR-002 –** Voters with Prior Registrations
- **VR-004 –** NVRA Compliance Statistics Report
- **VR-005 –** Potential Duplicate Voters Report
- **VR-007** – Voter Pending List Report
- **VR-009 –** Voter Status Summary Report
- **VR-010 –** Registrant Activity Report
- **VR-011 –** Registered Voters Report
- **VR-012 –** Voting Activity Report
- **VR-015 –** Even Odd Walking List Report
- **VR-018** - District Voter Register
- **VR-018** - Incomplete Registration Notification
- **VR-021 –** Cancelled Voters within a Date Range
- **VR-022 –** Late Registration Statistics Report
- **VR-023 –** Federal Survey Duplicate Registration
- **VR-024 –** Merged Voter Report
- **VR-025 –** Duplicate Voters Marked No Match
- **VR-026 –** No Match Audit Report – Voter Merge
- **VR-027 –** Voters Marked as Potential Felons
- **VR-028 –** Pre-Voter Registrations

Voter Registration (least useful stricken)

- **EX-001 –** Voter Walking List
- **EX-002 –** Voting History List
- **EX-003 –** Registered Voter List
- ~~**EX-004 –** Statewide Voter Extract~~
- ~~**EX-005 –** Statewide Voter Purge~~
- ~~**EX-006 –** Statewide New Registrants~~
- ~~**EX-007 –** Statewide Absentee Requestor~~
- ~~**EX-008 –** Statewide Late Registration~~
- ~~**EX-009 –** Statewide Changes to Registrants~~
- ~~**EX-010 –** Statewide Jury Pool Extract~~
- **EX-011 –** Late Registration Statistics
- ~~**EX-012 –** Voter Polling Place List~~
- ~~**EX-013 –** Federal Survey Duplicate Registration Export~~
- **VR-001 –** Change of Counties Report
- ~~**VR-002 –** Voters with Prior Registrations~~
- ~~**VR-004 –** NVRA Compliance Statistics Report~~
- **VR-005 –** Potential Duplicate Voters Report
- **VR-007 –** Voter Pending List Report
- **VR-009 –** Voter Status Summary Report
- **VR-010 –** Registrant Activity Report
- **VR-011 –** Registered Voters Report
- **VR-012 –** Voting Activity Report
- **VR-015 –** Even Odd Walking List Report
- **VR-018 -** District Voter Register
- **VR-018 -** Incomplete Registration Notification
- **VR-021 –** Cancelled Voters within a Date Range
- **VR-022 –** Late Registration Statistics Report
- **VR-023 –** Federal Survey Duplicate Registration
- **VR-024 –** Merged Voter Report
- **VR-025 –** Duplicate Voters Marked No Match
- **VR-026 –** No Match Audit Report – Voter Merge
- **VR-027 –** Voters Marked as Potential Felons
- **VR-028 –** Pre-Voter Registrations

Lets remove exports/reports that are only available or useful at the state level.

Voter Registration

- **EX-001 –** Voter Walking List (Useful for candidates)
- **EX-002** – Voting History List
- **EX-003 –** Registered Voter List
- **EX-011 –** Late Registration Statistics
- **VR-001 –** Change of Counties Report (Identify individuals who move to or from your county)
- **VR-005 –** Potential Duplicate Voters Report (Extremely useful!)
- **VR-007** – Voter Pending List Report (Same data as you'd get from Voter Search)
- **VR-009 –** Voter Status Summary Report (Provides a summary of all Statuses and Status Reason)
- **VR-010 –** Registrant Activity Report (Allows a user to search for certain audit entries. Useful!)
- **VR-011** – Registered Voters Report (A list of all Voters. Options include: Status, District/Precinct, Effective Date)

Voter Registration

- **VR-012 –** Voting Activity Report (Provides information on voters for a selected election)
- **VR-015 –** Even Odd Walking List Report (Provides voters name/phone of individuals on both sides of the road)
- **VR-018** - District Voter Register (Useful for districts who run their own election)
- **VR-019-** Incomplete Registration Notification (Provides a ready to use form for Pending-Incomplete voters)
- **VR-021 –** Cancelled Voters within a Date Range (Shows cancelled voters within a date range – long time to run)
- **VR-022** – Late Registration Statistics Report (Report must be run before you close an election)
- **VR-024 –** Merged Voter Report (Returns all voters who have been merged in your county)
- **VR-025 –** Duplicate Voters Marked No Match (This report fails to include WHO was the new duplicate)
- **VR-026 –** No Match Audit Report – Voter Merge (Report is hard to use as it does include Cancelled voters)
- **VR-027 –** Voters Marked as Potential Felons (Useful to identify potential Felons)
- **VR-028 –** Pre-Voter Registrations (Provides number of total Unprocessed, Processed, and Cancelled Pre-Registrations)

Districts & Precincts

- **DP-001 –** District Listing (Lists all districts in your county by District Type)
- **DP-002 –** District Splits (Lists all splits in each district)
- **DP-003 –** District Voter Count (Provides the total voter per district)
- **DP-004 –** Position Listing (Total positions per District and term years)
- **DP-005 –** Precinct Splits (Lists all splits in each precinct)
- **DP-006 –** Precinct Splits Count (This report is useless since we don't register by party)
- **DP-007 –** Precinct Voter Count (Total voters by precinct and Status)
- **DP-008 –** Precinct Listing (Polling location assigned to each precinct)
- **DP-009 -** District Within Precinct (Lists all districts within each Split)
- **DP-010 –** Precinct Within Districts (Can show all precincts and splits within a given jurisdiction)
- **DP-011 –** Elected Officials report (Position holder of each position in the district)
- **EXDP-001 –** Precinct Listing Export (Polling place in each precinct, export)
- **EXDP-002 –** Districts within Precincts Export (Shows all districts in splits, really useful)

Petitions

- **EXPM-001 –** Circulators Export (A list of circulators)
- **EXPM-002 –** Petition Signers Export (Information about signers and circulators)
- **EXPM-003 –** Petition Certification – Statistics by House District (Data about HD)
- **PM-001 –** Circulators (A list of circulators for a selected petition)
- **PM-002 –** Duplicate / Triplicate Signature Recording Form (Shows Dupes/Trips)
- **PM-003 –** Petition Processing Statistics (Basic data on selected petition; for statewide petitions, defer to SOS to provide these totals since they are statewide totals)
- **PM-004 –** Petitions (Lists all petitions for your search criteria)
- **PM-005 –** Petition Signers (A printout of the acceptance and rejections you entered into petitions module)

Petitions

- **PM-006 –** Petition Signature Statistics (Detailed stats about signatures for a petition)
- **PM-007 –** Petition Summary Results Verification (Detailed stats per submittal)
- **PM-008 –** Petition Signature Page Line Statistics (Detailed petition summary)
- **PM-009 –** Petition Certification – Statistics by House District (Most useful Petition form – sent to SOS for statewide ballot issues!)
- **PM-010 –** Duplicate/Triplicate Signature for Petition (Provides all data about dupe/trip signatures)
- **PM-011 –** Petition Signers / Changed Counties (I don't believe this is useful)
- **PM-012 –** Unfinished Submittals (Good report to verify you have finished all submittals)

Ballot Processing

- **BP-002 –** Ballot Statistics By Precinct (Stats by precinct, you can also run by district)
- **BP-004 –** Ballot Statistics By Ballot Style (Stats by ballot style)
- **BP-010 –** Ballot Batches Unprocessed (Useful report if you cannot close your election!)
- **BP-011 –** Ballot Batches Receiving (Data about individual batches)
- **BP-012 –** Voter Listing By Ballot Style (Useful report to show who received what ballot #)
- **BP-013 –** Undeliverable Ballots (Undeliverable ballots)
- **BP-016 –** Absentee/ Mail Ballot Sent By Ballot Style (# of Ballots sent by style)
- **BP-020 –** Duplicate Ballots Report (appears to provide all Reissued ballots)
- **BP-023 –** Ballot Style Key (Unsure what this report would be useful for)

Ballot Processing

- **BP-026 –** Ballot Statistics for Return by Date and Source (How ballots came back by Date)
- **BP-028 –** Ballot Proofing – By Precinct, Splits and Styles (Total voters per split)
- **BP-031 –** Batch Exception List Report (Provides all ballots that have tripped an exception)
- **BP-034 –** Ballot Stage/Status in Date Range (Provides Stage/Status of all ballots)
- **BP-035 –** Undeliverable Ballot Labels (Creates labels for a date range)
- **BP-036 –** Ballots Preventing Election Certification (Useful if you can't close your election)
- **BP-037 –** Seasonal Absentee Report (Provides seasonal voters and multiple addresses)
- **BP-038 –** Ballot Status Change (Shows changes in ballot status)
- **EX-BP1 –** Voter Master Listing by Election (Provides details about all absentee ballots)
- **EX-BP2 –** Undeliverable Ballot Labels Export (Export for undeliverable ballots)

Best Reports?

There is no definitive list of reports to use or not to use. There may be reports/exports that you find useful that are not on next couple of slides.

There are basically two different categories of reports/exports.

Ones that are directly useful for administering an election and ones that are useful for all other data.

Election Reports

EX-E01 – Export for Absentees Voters in an Election. This export contains a wide swath of information on all voters that were issued an absentee (or mail) ballot.

BP-034 – Ballot Stage/Status in Date Range – Useful for reconciling ballots. Some counties use this report multiple times a day.

BP-004 – Ballot Statistics By Ballot Style – This gives you a summary of ballots for each style.

EX-E016/E-016 – Candidate List

Provisional Ballot Export – Useful to keep track of data in the provisional ballot module.

Late Registration Search – Must be done before you close your election. Useful to have to keep track of all your late registrants.

VR-018 – District Voter Register – Used for District Elections

Non-Election Reports

EX-001 – Voter Walking List – Useful for door-to-door campaigning.

EX-003 – Registered Voter List – Just a great snapshot of registered voters.

VR-005 – Potential Duplicate Voters Report – I'd recommend a calendar reminder every two weeks or once a month to run this report.

VR-007 - Voter Pending List – Useful for keeping tabs on your pending voter list.

VR-010 – Registrant Activity Report – This report has the potential to be extremely useful. It basically allows you to query audit logs of voters based on Audit types.

EX-E015/E-015 – Absentee Type Date Range Report – Biennial Absentee confirmations.

PM-009 – Sent to the State for statewide ballot issues.

Questions?